



# Intake

## How Do I Guide

### Intake

#### Information and Referral

##### How Do I...?

Document a request for information

##### Selections

- Click Create > Intake > Information and Referral...
- Enter Applicable data/values
- Click Save.
- Click Close.

##### Tips & Guidelines

*Information and Referral records are not stored on the Desktop. This information can only be accessed on the Referrals report.*

#### Services Intake

##### How Do I...?

Establish services intake record

##### Selections

- Click Create > Intake > Services Intake
- On the Intake Inquiry Search page, complete the last name and first name fields.
- Click the Search button.
  - For a match: Click the select link for the applicable person(s).
  - For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Intake Inquiry Search page. Click the Create button to access the Intake Participant page. Enter all applicable data/values and click the Continue button. If potential person matches exist, the Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Intake Inquiry Search page.
  - Add additional participants by completing the last name and first name fields and repeating the step above.
  - After all participants have been added and searched, click Add Participants.
  - Click Continue.
- On the Services Intake page, enter the applicable data/values.
- Enter the applicable data/values on templates, as appropriate. Click Close and Return to eWiSACWIS.

##### Tips & Guidelines

*Service Intake types of Re-open to Merge Case, Re-open Case/Closed in Error, or Re-open/Update AFCARS Data can be used to re-open a closed case.*

*The Female Head of Household typically has the Relationship of Reference Person and Role of Referral Name*

*You can add several related people to the intake at once by expanding the Search Person outline to the listing of participants under the Related People subject. Click the Select link for each participant that applies to this intake.*

*If you close an intake before completion, reopen it from the Intakes outline. If you do not see a pending intake, click the Refresh button on the banner.*

*If the Services Intake is for a Relinquished Infant case, at least one participant on the "CW-Relinquishment" services intake should be assigned a role of "Biological Child". The participant assigned a role of "Biological Child" will become associated with a checked "Relinquishment Case" checkbox after the intake is screened in by the supervisor.*

Change Services Intake to a Protective Services Report

- On the Services Intake page/Participant tab, select 'Change to PS Report' in the Options list. Click Go.
- A message displays indicating the Services Intake will be changed to a Protective Services Report. Click Yes to continue and create the PS Report.
- On the Protective Services Report page, enter the applicable data/values.

*Prior to making the intake screening decision, you can change a Services Intake to a PS Report and retain the intake participants by selecting the 'Change to PS Report' option.*

*Information contained in the Service Intake Summary and Service Intake Referral Information templates will be available as view only in the PS Report created as a result of the intake change.*

Screen in/out services intake

- On the Basic tab/Worker Decision box, click the applicable radio button (Screen in or Screen out).
- Select the applicable Reason field value. Click Save.

*A services intake is assigned to the supervisor to make the final screening decision.*



**WiSACWIS Help Desk (866) 335-2180**  
**helpdesk@wi.gov**



# Intake

## How Do I Guide

### Protective Services Report

#### How Do I...?

#### Selections

#### Tips & Guidelines

Establish protective services report intake record

- Click Create > Intake > PS Report.
- On the Intake Inquiry Search page, complete the last name and first name fields.
- Click the Search button.
  - For a match: Click the select link for the applicable person(s).
  - For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Intake Inquiry Search page. Click the Create button to access the Intake Participant page. Enter all applicable data/values and click the Continue button. If potential person matches exist, the Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Intake Inquiry Search page.
  - Add additional participants by completing the first name and last name fields and repeating the step above.
  - After all participants have been added and searched, click Add Participants.
  - Click Continue.
- On the Protective Services Report page, enter the applicable data/values.
- Enter the applicable data/values on templates, as appropriate. Click Close and Return to eWiSACWIS.

*Note: All tabs contain an Options list to access the PS Report, narratives, and notice templates. The report details must be entered on the PS Report Narrative page (select PS Report Narrative from the Options list). Text templates are not modifiable after screening decision has been made.*

*The Female Head of Household typically has the Relationship of Reference Person and Role of Report Name.*

*You can add several related people to the intake at once by expanding the Search Person outline to the listing of participants under the Related People subject. Click the Select link for each participant that applies to this intake.*

*If a person is part of an intake, but his/her name is unknown, when entering the intake, log the first and/or last name as "Unknown". Be sure to update the correct Unknown, Unknown person record as additional information about the person is learned.*

*If you close an intake before completion, reopen it from the Intakes expando. If you don't see a pending intake, click View > Refresh.*

Change Protective Services Report to a Services Intake

- On the Protective Services Report page/Participant tab, select 'Change to Services Intake' in the Options list. Click Go.
- A message displays indicating the Protective Services Report will be changed to a Services Intake. Click Yes to continue and create the Services Intake.
- On the Services Intake page, enter the applicable data/values.

*Note: The Services Intake Type defaults to 'Child Welfare - Other' as a result of the intake change. When the Services Intake is first saved, the Services Intake Type will be frozen.*

*Prior to making the intake screening decision, you can change a Protective Services Report to a Services Intake and retain the intake participants by selecting the 'Change to Services Intake' option.*

*Information contained in the PS Report Narrative template will be available as view only in the Services Intake created as a result of the intake change.*

Screen in/out PS report

- On the Decision tab/Status/Worker Decision box, click the applicable radio button (Screen in or Screen out).
- Enter the other applicable data/values. Click Save.

*A PS report is assigned to the supervisor to make the final screening decision.*

*You may not Screen In a PS Report with a Response Time of Pending.*



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